Seniors

BUSINESS PLAN 2004-07

ACCOUNTABILITY STATEMENT

The Business Plan for the three years commencing April 1, 2004 was prepared under my direction in accordance with the *Government Accountability Act* and the government's accounting policies. All of the government's policy decisions as of February 27, 2004 with material economic or fiscal implications of which I am aware have been considered in preparing the Business Plan.

The Ministry's priorities outlined in the Business Plan were developed in the context of the government's business and fiscal plans. I am committed to achieving the planned results laid out in this Business Plan.

[original signed]

Stan Woloshyn, *Minister of Seniors*
March 4, 2004

THE MINISTRY

The Ministry of Seniors consists of the Department of Seniors, the Seniors Advisory Council for Alberta, and the Alberta Social Housing Corporation (ASHC).

The Department develops and delivers programs, services, and planning initiatives for seniors and the aging population; administers the Office of the Public Guardian; and supports the provision of housing for seniors, families, and persons with special needs.

The Seniors Advisory Council for Alberta brings the views of seniors to the attention of government and makes recommendations to the government on the coordination of policies and programs relating to seniors. The ASHC is an agent of the Crown established under the authority of the *Alberta Housing Act*. The corporation operates primarily as an administrative device for holding housing assets, including mortgages.

LINK TO THE GOVERNMENT BUSINESS PLAN

Seniors' core businesses support the strategies in the Government of Alberta's Strategic Plan for making Alberta the best place to live, work and visit, as well as the Government of Alberta's Business Plan Goals:

- Albertans will be self-reliant and those unable to provide for their basic needs will receive help.
- Alberta will have effective and sustainable government-owned and supported infrastructure.

VISION

A vibrant province where Albertans live with dignity as full participants in society and experience the best possible well-being and independence.

MISSION

To provide services, programs, and information that contribute to the well-being and independence of seniors, persons in need of housing supports, and clients of the Office of the Public Guardian.

CORE BUSINESSES

Core Business 1: Provide services, programs, and planning for seniors and the aging population.

Goal 1 - Seniors in need have access to financial supports that enable them to live in a secure and dignified way.

Goal 2 - Information provided by the Ministry on programs, services, and initiatives for older Albertans is accessible, accurate and consistent.

Goal 3 - Government policies, programs, and plans effectively anticipate and respond to the needs of current and future seniors.

Core Business 2: Support the provision and ongoing management of basic housing and emergency shelter for lower-income Albertans.

Goal 4 - Provincially owned and supported housing is efficiently and effectively managed and appropriately utilized.

Goal 5 - Development of a range of housing for lower-income Albertans is supported by the Ministry.

Core Business 3: Provide programs, services, and supports to enable appropriate substitute decision-making.

Goal 6 - Albertans' best interests and well-being are served through appropriate and timely substitute decision-making.

SIGNIFICANT OPPORTUNITIES AND CHALLENGES

SERVING ALBERTA'S SENIORS

The challenge for Seniors in serving seniors is to respond effectively to the diversity and changing needs of the seniors population, while maintaining long term sustainability of services.

The seniors population spans more than two generations, with an age range from 65 to over 100 years. It encompasses different work and cultural experiences; different skills, abilities, expectations; and varying levels of health, vulnerability, financial independence, and education. Seniors' living situations include independent home living, home living with supports, assisted living, and long-term care.

Seniors' incomes are lower on average than those of most other age groups, deriving primarily from pensions, government transfers, and private savings. Unlike younger people, seniors have relatively fixed incomes, with limited ability for improvement through employment or education, and limited capacity for increasing savings.

However, their costs are variable. Although some costs (e.g., mortgage payments) may be lower for seniors, other costs increase, especially for seniors who become frail as they age. These costs include home maintenance, personal care, transportation, daily living aids, prescription medications, and long-term care accommodation. In addition, lower income seniors are particularly affected by unexpected expenses (e.g., sudden increases in utility costs, major house repairs) and reductions to or increased cost-sharing of government programs.

The Ministry has used its existing financial support programs to enable lower-income seniors to access supportive living services, and to relieve the burden of unexpected and extraordinary expenses. The success of this approach provides an opportunity for the Ministry to continue to build flexibility into its policy and program responses, while ensuring the long-term sustainability of supports.

In addition, the transfer of responsibility for long-term care accommodation to Seniors provides an opportunity for the Ministry to monitor and improve the quality of these accommodation services for seniors.

PLANNING FOR TOMORROW'S SENIORS POPULATION

Although the Ministry's programs are targeted to the current population of seniors, Seniors is challenged to look beyond today's seniors and consider how Alberta might prepare its programs, services and infrastructure for tomorrow's seniors, especially those Albertans who make up the "baby boom" generation. These are people who are currently in their 40s and 50s and who may be different in important ways from current seniors, for example, in terms of education, income, expectations, and health status.

As Alberta adapts to this social and demographic shift, Seniors has a unique opportunity to contribute to debates and initiatives related to Alberta's aging population, and to influence the policies and programs that will respond to new needs and new expectations around issues such as healthy aging, financial planning, age of retirement, lifelong learning, and access to health care.

HOUSING ALBERTANS IN NEED

Seniors' challenges in the area of housing are to facilitate planning and direct resources to identified populations who are unable to find suitable housing within their means. People working for low wages in high-growth urban centres and lower-income people in northern and remote areas have particular difficulty finding housing. In addition, there is a need for supportive housing for lower-income seniors, and housing coordinated with support services for persons with disabilities, especially severe and persistent mental illnesses. Finally, with the transfer of responsibility for emergency shelters to Seniors, there is a need to help homeless individuals access services that are intended to enhance their potential for independent living and housing stability.

Over the past three years, Seniors has forged a number of collaborative relationships with other ministries, other levels of government, community organizations, and the private sector. These include, for example, partnerships under the Alberta-Canada Affordable Housing Program and the Provincial Homelessness Initiative, which have generated capital for more than 1,300 affordable housing units, and approximately 2,000 emergency, transitional and long-term supportive housing units.

Partnerships such as these provide rich opportunities for the Ministry to continue the process of developing capital incentives for new housing units, as well as transfer and redevelopment of existing housing units by community organizations.

OFFICE OF THE PUBLIC GUARDIAN - A NEW AREA OF RESPONSIBILITY

During 2003-04, the Office of the Public Guardian was transferred to Seniors. This new area of responsibility brings with it challenges that include an increasing caseload, the need to balance the best interests of clients with service pressures, and the need for improved public education concerning the scope and meaning of guardianship. The Ministry looks forward to developing a new vision and new strategic directions for the Office of the Public Guardian to meet these challenges.

STRATEGIC PRIORITIES 2004-07

Through the Ministry's review of external and internal challenges, the strategic priorities described below have been identified. These are in addition to the important ongoing core activities of the Ministry.

1. Contributing to sustainable and high quality continuing care.

Linkage: Goal 3

As a partner with Health and Wellness, and Finance on the Cross-Ministry Health Sustainability Initiative, the Ministry will continue to play an active part in increasing incentives to shift continuing care services from facility-based to community-based settings. Seniors will clarify roles and responsibilities for payment and delivery of long-term care accommodation, and develop accountability mechanisms to monitor quality.

2. Preparing for an aging population.

Linkage: Goals 1, 2, and 3

Seniors will partner with other ministries, other levels of government, and community organizations to facilitate or contribute to initiatives that encourage and enable Alberta's citizens and institutions to prepare for an aging population in areas such as financial and retirement planning; healthy aging and active living; and safety and security.

3. Clarifying roles and responsibilities for housing.

Linkage: Goals 4 and 5

Seniors will work with other ministries, other levels of government, community organizations, and the private sector to define the roles and responsibilities for housing and support services to lower-income persons. Knowing "who does what" will help in allocating and completing the tasks required to improve and coordinate existing housing and services, and generate capital for new housing and services.

4. Achieving sustainable housing services.

Linkage: Goals 4 and 5

To optimize its housing operations, the Ministry will focus on:

- Directing capital funding to community organizations for the development of local responses to housing pressures in their communities to reduce reliance on provincial funding;
- Continuing the process of transferring ownership of housing assets to community organizations;
- Ensuring shelter assistance is appropriately targeted.

5. Developing strategic directions for the Office of the Public Guardian.

Linkage: Goal 6

The Ministry will conduct a review of the policies, practices, mandate, and long-range strategic directions of the Office of the Public Guardian, and its relationship with other ministries and organizations, to maintain clear, consistent, and coordinated policies and appropriate services.

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CORE BUSINESSES, GOALS, STRATEGIES AND MEASURES

Core Business One: Provide services, programs, and planning for seniors and the aging population.

GOAL ONE

Seniors in need have access to financial supports that enable them to live in a secure and dignified way.

What it means

Seniors delivers income assistance programs for seniors. Alberta Seniors Benefit is an income-based program that provides lower-income seniors with monthly financial benefits, and calculates Alberta Health Care Insurance Premium exemptions. Special Needs Assistance for Seniors program provides a lump-sum payment for one-time, extraordinary expenses. For seniors who access the Special Needs Assistance for Seniors program, speedy assessment of applications is especially important.

Income is one of the major determinants of health and well-being. The supports provided by these programs help seniors to live with dignity by enabling them to make their own financial decisions, secure their basic living needs, and continue as participating and contributing members of the community.

Strategies

- Continue to identify potential improvements to income-based seniors' benefits that are responsive to changing needs, and that result in improved fairness and simplified eligibility and administration.
- Examine approaches to providing supports for seniors that respond efficiently, effectively, and flexibly to individual needs.

Performance Measures	Last Actual (2002-03)	Target 2004-05	Target 2005-06	Target 2006-07
1. Percentage of seniors provided with the opportunity to apply for Alberta Seniors Benefit.	New		To be determined	
2. Assessment time for Special Needs Assistance for Seniors program applications.	New		To be determined	

GOAL TWO

Information provided by the Ministry on programs, services, and initiatives for older Albertans is accessible, accurate and consistent.

What it means

Seniors provides information for and about seniors and the aging population. Information is provided through telephone access, publications such as *Seniors Programs and Services Information Guide*, the Ministry website, seniors information services offices, correspondence, and through the Ministry's participation in cross-ministry and community-based planning and program development activities.

Quality information about programs and services enables seniors, their family members, and service providers to learn about supports for which seniors may be eligible, and assists them in making wise choices concerning housing, living situations, and service needs. For government, community organizations and service providers, accessible, accurate and consistent information on programs and services; policies and initiatives; and on demographic, social and economic trends impacting seniors and the aging population supports the development of appropriate and responsive policies and programs.

Strategies

- Review Ministry-wide processes for delivering information to seniors, their families and service providers to enhance efficiency and consistency.
- Identify new opportunities and partnerships for educating communities, governments, service providers, and individuals on issues relating to seniors and the aging population, such as active living, fraud prevention, lifelong learning, seniors' contributions, retirement planning, and healthy aging.

Performance Measures	Last Actual (2002-03)	Target 2004-05	Target 2005-06	Target 2006-07
Satisfaction with information services provided by:				
• Telephone access	90.7%	90%	90%	90%
• *Seniors Programs and Services Information Guide**	90.7%	90%	90%	90%
• Seniors Information Services Offices	94.4%	90%	90%	90%

* previously titled *Programs and Services for Seniors.*

GOAL THREE — Government policies, programs, and plans effectively anticipate and respond to the needs of current and future seniors.

What it means

The Ministry engages in research, monitoring and analysis activities on social, economic and political trends, issues, policies, and programs within Alberta, across Canada, and globally.

The Ministry collaborates at different levels to draw attention to demographic trends, and helps to ensure that any potential impact on current or future seniors of proposed program or policy activities is fully understood and considered. A knowledge-based, collaborative approach to working with partners helps in the development of sustainable policies and programs that are sensitive and responsive to demographic factors.

Strategies

- Partner with other ministries and other levels of government to facilitate the development of projects in the areas of healthy aging, safety and security, family violence, transportation, financial planning, work and the workplace, rural development, and family caregiving.
- Improve analysis of data on seniors' incomes to provide a basis for forecasting future income support needs of seniors.
- Identify and implement the legislative amendments required for Seniors to assume full responsibility for long-term care accommodation.
- Partner with other ministries, regional health authorities and facility operators to develop mechanisms for monitoring and improving the quality of long-term care accommodation.
- Facilitate the shift from facility-based to community-based services by supporting the development of affordable seniors' supportive housing, appropriate income supports, and access to community services for lower-income seniors.

Performance Measure	Last Actual (2002-03)	Target 2004-05	Target 2005-06	Target 2006-07
Satisfaction of departments and agencies with the ministry's collaborative activities, and contribution to joint initiatives.	Revised Measure*	90%	90%	90%

* Measure reported in 2002-03 Annual Report was "Satisfaction of departments and agencies with the ministry's leadership and collaboration, and with the information, advice and analysis received".

Core Business Two: Support the provision and ongoing management of basic housing and emergency shelter for lower-income Albertans.

GOAL FOUR

Provincially owned and supported housing is efficiently and effectively managed and appropriately utilized.

What it means

Seniors is charged with the stewardship of a housing portfolio that enables access to emergency shelter, and to subsidized housing for Albertans whose income does not allow them to pay full market rent for their accommodation. Subsidized housing in Alberta includes housing for low-income families and individuals, housing for persons with special needs, apartments for lower-income seniors, and seniors' supportive housing facilities that provide additional services such as meals and laundry.

Seniors partners with the federal government, through the Canada Mortgage and Housing Corporation, to support the costs of maintaining many of the units in this portfolio, and is accountable to Albertans to ensure that its portfolio is managed appropriately. In some cases this may mean ensuring that housing is effectively and efficiently managed and utilized through contracts with community organizations. In other cases, it entails preparing community organizations, such as municipalities and non-profit housing organizations, to assume responsibility of housing delivery through transfer of ownership.

Strategies

- Ensure effective governance structures are in place for the community-based provision of seniors', family and special purpose housing in urban, rural and remote communities.
- Create effective linkages with community organizations for the purpose of transferring ownership/management of provincial housing.
- Develop a flexible approach to managing the Ministry's housing portfolio that takes into account changing resident needs, within financial resources available.
- Monitor operations and business practices of housing operators to ensure efficiency and effectiveness.

Performance Measures	Last Actual (2002-03)	Target 2004-05	Target 2005-06	Target 2006-07
* Quality of accommodation provided by housing operators, and where appropriate, services provided, as indicated by satisfaction of residents of:				
• Seniors' lodges	90.8%	93.0%	93.0%	93.0%
• Self-contained housing	92.0%	93.0%	93.0%	93.0%
• Family housing	77.5%	80.0%	80.0%	80.0%

* Actual measure as reported in 2002-03 Annual Report was for "satisfaction of housing clients with quality of accommodation and, where appropriate, services provided".

GOAL FIVE

Development of a range of housing for lower-income Albertans is supported by the Ministry.

What it means

Many lower-income Albertans cannot afford to pay market rents for accommodation in the private sector, or are unable to find specialized housing and support services to address special needs that they may have, such as mental or physical disabilities. There is also a need to provide suitable accommodation and supports to assist homeless Albertans to achieve stability and independence in their living environments.

To address these issues, Seniors works in partnership with housing organizations, other ministries and federal and municipal governments to identify local housing needs and generate capital to increase the supply of and access to affordable and low-cost housing options for lower-income families and individuals, persons with special needs, and seniors.

Strategies

- Encourage and support the development of community housing plans in high-growth, high-need areas that are based on local needs and established priorities, and direct resources accordingly.
- Create effective linkages with stakeholders, housing operators, other ministries, and other levels of government to facilitate development and delivery of affordable, appropriate housing.
- Review emergency shelter funding to determine if it is properly targeted and shelters are appropriately resourced.
- Facilitate access to coordinated housing and support services for persons with special needs to enable them to live in appropriate and stable community-based accommodation.

Performance Measure	Last Actual (2002-03)	Target 2004-05	Target 2005-06	Target 2006-07
Number of the seven major high-need, high-growth communities within the province that have plans for responding to the housing needs of their citizens.	New	To be determined		

Core Business Three: Provide programs, services, and supports to enable appropriate substitute decision-making.

GOAL SIX

Albertans' best interests and well-being are served through appropriate and timely substitute decision-making.

What it means

Adult Albertans who are unable to make their own personal decisions may be provided with a court-ordered guardian as substitute decision-maker under the terms of the *Dependent Adults Act*. Where possible, private guardianship by family members or other private individuals is encouraged, as this is seen in most cases to be in clients' best interests. Where no appropriate private party is available, the Public Guardian may be appointed. The Public Guardian may also be appointed as decision-maker of last resort under the *Mental Health Act*. As guardian, the Office of the Public Guardian provides personal decision-making services to approximately 1,900 dependent adults in Alberta.

Seniors, through the Office of the Public Guardian, also encourages adult Albertans to make personal directives, which may name an agent as substitute decision-maker in the event the person becomes unable to make personal decisions.

The Office of the Public Guardian provides information and referral to individuals, service providers, agencies, and other ministries on guardianship and personal directives. Information is provided directly and through services contracted with community agencies through the Community Involvement Program.

Strategies

- Review Community Involvement Program services to ensure contracts provide for efficient, appropriate and effective services.
- Examine methods of information provision to enhance the quality and consistency of information provided to Albertans on legislation relating to substitute decision-making.
- Begin consolidating issues around the *Dependent Adults Act* and *Personal Directives Act* in preparation for full legislative reviews in 2007 and 2008.

Performance Measures	Last Actual (2002-03)	Target 2004-05	Target 2005-06	Target 2006-07
1. Satisfaction with supports and services provided by the Office of the Public Guardian:				
• Service providers	89%	90%	n/a*	90%
• Private Guardians	88%	90%	n/a*	90%
2. Percentage of dependent adults with private guardians	79%	80% or higher	80% or higher	80% or higher

* n/a - not applicable measured every two years.

EXPENSE BY CORE BUSINESS

(thousands of dollars)

	Comparable 2002-03 Actual	Comparable 2003-04 Budget	Comparable 2003-04 Forecast	2004-05 Estimates	2005-06 Target	2006-07 Target
Provide Services, Programs, and Planning for Seniors and the Aging Population	190,400	194,898	228,448	244,989	247,794	250,671
Support for the Provision and Ongoing Management of Basic Housing and Emergency Shelter for Lower-Income Albertans	191,100	197,589	211,909	220,203	203,860	178,407
Provide Programs, Services, and Supports to Enable Appropriate Substitute Decision Making	4,808	4,974	4,974	5,056	5,058	5,061
MINISTRY EXPENSE	386,308	397,461	445,331	470,248	456,712	434,139

MINISTRY STATEMENT OF OPERATIONS

(thousands of dollars)

	Comparable 2002-03 Actual	Comparable 2003-04 Budget	Comparable 2003-04 Forecast	2004-05 Estimates	2005-06 Target	2006-07 Target
REVENUE						
Transfers from Government of Canada	73,502	85,379	85,379	89,738	75,803	62,904
Investment Income	1,501	849	849	900	900	900
Premiums, Fees and Licences	129	105	105	105	105	105
Other Revenue	17,771	4,852	4,852	285	135	135
MINISTRY REVENUE	92,903	91,185	91,185	91,028	76,943	64,044
EXPENSE						
Program						
Provide Services, Programs, and Planning for for Seniors and the Aging Population	187,991	192,224	225,774	242,129	244,829	247,529
Support for the Provision and Ongoing Management of Basic Housing and Emergency Shelter for Lower-Income Albertans	144,165	152,437	166,757	176,903	162,963	140,263
Provide Programs, Services, and Support to Enable Appropriate Substitute Decision Making	4,721	4,892	4,892	4,984	4,984	4,984
Ministry Support Services	4,141	4,614	4,614	4,768	4,768	4,768
Valuation Adjustments and Other Provisions	173	185	185	185	185	185
Program Expense	341,191	354,352	402,222	428,969	417,729	397,729
Debt Servicing Costs						
Alberta Social Housing Corporation	45,117	43,109	43,109	41,279	38,983	36,410
MINISTRY EXPENSE	386,308	397,461	445,331	470,248	456,712	434,139
Gain (Loss) on Disposal of Capital Assets	7,457	10,749	10,114	12,409	11,037	11,037
NET OPERATING RESULT	(285,948)	(295,527)	(344,032)	(366,811)	(368,732)	(359,058)

CONSOLIDATED NET OPERATING RESULT

(thousands of dollars)

	Comparable 2002-03 Actual	Comparable 2003-04 Budget	Comparable 2003-04 Forecast	2004-05 Estimates	2005-06 Target	2006-07 Target
Ministry Revenue	92,903	91,185	91,185	91,028	76,943	64,044
Inter-ministry consolidation adjustments	-	-	-	-	-	-
Consolidated Revenue	92,903	91,185	91,185	91,028	76,943	64,044
Ministry Program Expense	341,191	354,352	402,222	428,969	417,729	397,729
Inter-ministry consolidation adjustments	-	-	-	-	-	-
Consolidated Program Expense	**341,191**	**354,352**	**402,222**	**428,969**	**417,729**	**397,729**
Ministry Debt Servicing Costs	45,117	43,109	43,109	41,279	38,983	36,410
Consolidated Expense	386,308	397,461	445,331	470,248	456,712	434,139
Gain (Loss) on Disposal of Capital Assets	7,457	10,749	10,114	12,409	11,037	11,037
Inter-ministry consolidation adjustments	(129)	-	-	-	-	-
CONSOLIDATED NET OPERATING RESULT	(286,077)	(295,527)	(344,032)	(366,811)	(368,732)	(359,058)